

SOUTH GEORGIAN BAY LABOUR MARKET STUDY

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EXECUTIVE SUMMARY

Key messages

Key message #1: The South Georgian Bay area has a history and a culture of middle skill occupations which is also reflected in its pattern of educational attainment. This is not to say that the knowledge economy can or should be ignored. But the character of this area suggests that a more realistic approach is to build up the quantity and quality of middle skill jobs that in the past contributed to a strong middle class in this area.

Key message #2: Employment Services and training bodies need to partner with employers to respond to local needs. As well, employers in the same industry sector often have common workforce challenges which can better be addressed through initiatives that benefit from economies of scale.

Key message #3: To put in place such responsive services requires strong connections with employers, good intelligence about their needs and the effective alignment of different players. To reach such a level of insight, coordination and responsiveness requires active and dependable networks, where employers can articulate their needs and the various service providers (employment agencies, training bodies) can understand in greater detail what is needed. Such networks cannot spring into operation overnight. They require nurturing and development, at first gatherings that are part business and part social, which eventually can become the launching pads for more active and formalized networks that can support concrete projects and eventually full-blown strategies.

Demographics

Population growth patterns across the four municipalities vary. Collingwood and Wasaga Beach experienced double-digit percentage increases in population between 2006 and 2011, while Clearview and The Blue Mountains saw population decreases. Between 2001 and 2006, all four communities had experienced population increases.

South Georgian Bay has a distinct population age profile, with a greater proportion of older adults (45 to 64 years old) and seniors (65 years and older), and a smaller proportion of children (0-14 years old) and young adults (25-44 years old). All four communities fall below the provincial average for the proportion of the resident population that is within the prime working age range (25-54 years old).

Industries

Industries that have a greater concentration in the study area than that found in Ontario as a whole include:

- Agriculture
- Construction
- Real estate and rental and leasing
- Arts, entertainment and recreation
- Accommodation and food services

These latter four industries reflect the importance of tourism and retirement living in the area.

Added to this list are all other industries that represent at least 5% of all jobs in the local area:

- Manufacturing
- Retail trade
- Professional, scientific and technical services
- Educational services
- Health care and social assistance

In terms of what might be considered the Knowledge Economy, the local area has a proportion of jobs that falls below the average experienced across the province, and in several cases falls significantly below. These would include such industries as:

- Information and cultural industries
- Finance and insurance
- Public administration

And even though the following Knowledge Economy sectors have a relatively high number of jobs locally, they still form a smaller proportion of all jobs compared to the ratio in the rest of the province:

- Professional, scientific and technical services
- Educational services

Occupations

The male occupation profile for The Blue Mountains residents is slightly different from that of the other three communities, with notably higher concentrations of senior managers, business professionals and professional and technical occupations in art, culture and recreation. Blue Mountains shares with Clearview a higher proportion of workers in agriculture and with all local communities a high concentration of workers in the construction trades.

The other three communities have higher proportions of male residents working in the trades, transport and equipment operator occupations. Clearview and Collingwood have higher proportions of manufacturing assemblers. Collingwood also has higher proportion of machine operators and has more

males working in retail and food & accommodation occupations (as managers, sales clerks and chefs and cooks) and other sales and service occupations. Wasaga Beach has a notably higher proportion of male residents working in protective services (police officers, firefighters, security guards, armed forces personnel other than commissioned officers).

Across the study area as a whole, two occupations stand out for women:

- Retail sales clerks
- Other sales and service occupations (includes food counter attendants, cleaners, laundry occupations, hairstylists, aestheticians and pet groomers, among others)

Occupations for females resident in The Blue Mountains also reflect higher end jobs, such as finance and insurance occupations, lawyers, social workers, teachers and real estate agents as well as contractors and construction trades. The Blue Mountains and Collingwood have more women working as managers in retail and food & accommodation services, and Collingwood similarly has a higher proportion of female real estate agents. The Blue Mountains shares with Clearview a higher concentration of women working in agriculture.

Otherwise, Clearview, Collingwood and Wasaga Beach have a larger proportion of female residents working in the assisting occupations in health (most likely personal support workers, but this also includes dental assistants). Collingwood has a higher proportion of food and beverage servers, and workers in travel, accommodation, recreation and sport; Wasaga Beach has a high number of women working as cashiers, and Clearview has a high proportion of manufacturing assemblers.

In terms of broad occupational categories, a larger proportion of males in The Blue Mountains are employed in Knowledge Work jobs, while Clearview has a higher proportion in Working sector jobs, and Collingwood and Wasaga Beach have higher percentages in Entry-level Service jobs. Among females, women in The Blue Mountains are more likely employed in Knowledge Work, Collingwood and Wasaga Beach females are present in larger proportions in Entry-level Service jobs, while in Clearview females exhibit a varied distribution, including a larger (though still small) proportion in Working sector jobs.

Educational attainment

Residents of The Blue Mountains have a higher educational attainment profile than that of Ontario minus Toronto and almost match that of Toronto residents, except for a smaller number of university grads, balanced by a higher number of college grads. Clearview and Wasaga Beach, and to a lesser extent Collingwood, have a smaller proportion of university grads. Alternatively, they have a level of college grads equal to or greater than the average for the province, as well as a higher proportion of individuals with apprenticeship certificates. Collingwood also has a slightly higher proportion of individuals with a high school diploma while Clearview and Wasaga Beach have a notably higher proportion of individuals with no educational certificate. However, the story of educational attainment across these localities also needs to have regard for age, particularly when several of these communities are home to large retirement populations, an influx of residents from elsewhere.

Over the generations the proportion of individuals with no educational certificate falls quite dramatically. However, in terms of benchmarking their performance, it is worth noting that males aged 25-44 years of age in all of the municipalities in question have rates of no educational attainment higher than the provincial average, ranging from 15-17% (provincial average is 11%). Among female residents, only Wasaga Beach (11%) is slightly above the provincial average (9%).

Full-time, full-year work

The Blue Mountains and Wasaga Beach exhibit lower proportions of full-time full-year work than is found in Clearview and Collingwood, whose proportions are closer to that found in the rest of Ontario (minus Toronto). In Wasaga Beach, the low level of full-time full-year work is especially pronounced in the Retail Trade and Food & Accommodation Services industries, reflecting the greater seasonality of the tourism sector in that area. In The Blue Mountains the incidence of low full-time full-year work is especially noticeable in the Professional, Scientific & Technical Services and the Health & Social Assistance sectors, reflecting perhaps a higher proportion of semi-retired professionals working part-time.

Employment income

Wasaga Beach has a particularly lower percentage of its resident population (aged 15 years and older) who reported employment income in 2005, while Clearview has the highest proportion of the four towns under study. All four communities report median and average employment income figures lower than those found in Ontario (minus the Toronto numbers).

Looking at the earnings of jobs located in the study area, all four communities have a higher proportion of jobs whose annual employment income was under \$20,000 in 2005. This is particularly the case for Wasaga Beach, where 41% of jobs fell under \$20,000, reflecting the higher proportion of jobs that are seasonal and/or part-time (Clearview is not far off at 35%). At the other end of the scale, all four communities also exhibited a smaller proportion of jobs with higher incomes (above \$60,000) compared with the figure for Toronto or the rest of Ontario.

Employer survey

An employer survey was carried out between July 6 and August 9, 2011, generating 99 completions. The respondents were well distributed by industry, by geography and by employee size, so that while not a scientific sample, the survey responses do represent a good cross-section of employers in the local area.

Employers were asked to identify their workforce in terms of work status (full-time or part-time, permanent or non-permanent). The proportion of both part-time and non-permanent employment is particularly pronounced in the Service sector, as is part-time employment in the Health & Social Assistance sector. In terms of skill levels, the Service sector stands out with its high proportion of entry-

level jobs, while at the opposite end of the spectrum, the Knowledge sector stands out for its very low proportion of entry-level jobs. The Knowledge, Health & Social Assistance and Other sectors have high proportions of Senior and Intermediate occupations, while Manufacturing has a balance, with half of its jobs defined as entry-level and the other half a mix of Intermediate and Senior positions.

The prerequisite educational qualifications for a job varied by skill level, increasing as one moved up the skills ladder. Most entry-level jobs in the local area required no more than a high school education. More than half of employers expected a post-secondary degree for an Intermediate job, and more than half expected a university degree for a Senior level position. Similarly, employers expected more years of work experience as the skill level of the job increased.

Slightly over a quarter of employers expected the number of workers retiring in the next five years to increase, yet among manufacturing employers that proportion increased to almost half.

Overall, the higher one moves up the skill ladder, the harder employers say it is to find qualified employees. Fully two-thirds of employers said it was very challenging finding qualified people for senior level positions. That being said, a quarter of employers also said they found it very challenging to find entry-level workers.

When asked their greatest challenge when recruiting a new employee, the issues varied by industry: Knowledge Work employers were more likely to cite soft skills such as problem-solving and public relations, manufacturers seek a particular certificate while service sector employers seek motivated and flexible employees.

While almost no employers expect the level of training to decrease over the next three years, most expect it to stay the same, except for employers in the manufacturing sector, where a considerable majority expect the level of training to increase.

The most frequent strategies that employers use to recruit employees are:

- Word of mouth
- Electronic postings
- Employee recommendations
- Internal postings
- Newspaper advertisements
- Walk-ins or inquiries

The recruitment strategies receiving the highest satisfaction ratings were:

- Word of mouth
- Employee recommendations
- Internal postings

The recruitment strategies receiving the lowest satisfaction ratings were:

- Private recruitment or temp agencies
- Job fairs

Recommendations

The recommendations divide into two categories: firstly, over-arching themes, and secondly, specific initiatives.

The two over-arching themes are:

- 1) To focus on middle category jobs, those jobs that require a skill typically acquired through a college degree and/or through extended on-the-job training and experience; and
- 2) To promote networks to tackle various labour market challenges.

The specific initiatives include:

- More efforts to support local manufacturing, by: formalizing a local manufacturers' network; applying a regional scope to the network and including other relevant stakeholders, such as Georgian College; having the manufacturers' network focus on common recruitment, hiring and training challenges; and undertaking more outreach to high school students to familiarize them with career opportunities in manufacturing;
- To support the local tourism sector through: promoting employee engagement strategies among employers; publicizing career opportunities among prospective and current employees; and working with employers to establish clear career ladder opportunities for employees;
- To explore with the area's local health integration network the feasibility of establishing a career ladder program in the health care field;
- To explore alternative programs to enhance transportation options for local residents who need to commute to employment;
- To develop a formal trailing spouse program, to enhance the ability of local employers to recruit senior level staff by more effectively tackling the employment challenges faced by their significant other;
- To engage further with Georgian College as a key partner in local workforce development;
- To engage with Simcoe County Ontario Works and their employment services to develop labour market projects that respond to employer needs and that can offer training and employment opportunities to marginalized residents seeking jobs;
- To explore options for a shared incubator space for knowledge sector start-ups;
- To create a small, local venture capital fund for knowledge sector start-ups;
- To find a way for the various resources that currently are available for entrepreneurial support to collaborate and offer a one-window approach for accessing their array of services and resources.

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